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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

F.S.
W-14

FOREIGN NEWS ON NUTS

January 14, 1927.

WALNUT SITUATION AT NAPLES, ITALY

The demand for walnuts in South Italy during the first four months of the current season (September-December) has been unusually heavy due to the poor French crop and the low crop in California, according to a report received in the Department of Agriculture from Consul Harold D. Finley at Naples. Stocks on hand on December 14 amounted to only about 28,600 bags of 110 pounds each, held mostly in small parcels in producing regions.

As a result of this situation, no market price can be quoted, says the Consul. On December 4, 1926, the Naples Chamber of Commerce quoted Sorrentos at \$17.23 to \$17.72 per 100 pounds (lira 875 to 900 per metric quintal) f.o.b. Naples. In late September these nuts were offered at from \$13.76 to \$14.10 per 100 pounds. Shipments of unshelled walnuts from Naples to the United States from September 1, 1926 to December 13, 1926 amounted to 112,400 bags valued at \$1,882,000. Shipments of shelled nuts during the same period amounted to 152,000 pounds valued at \$26,000.

The following is a statistical summary of the South Italian walnut production and trade in unshelled walnuts from September 10 to December 14, 1926:

	<u>Bags*</u>	<u>Bags*</u>
South Italian crop, 1926 (final estimate)		175,000
Estimated old stocks on hand, Sept. 10, 1926		<u>1,000</u>
Total supply		176,000
Exports to United States, Sept. 10 to Dec. 14, 1926	112,400	
Exports to other countries (estimated).....	17,000	
Estimated consumption of South Italian walnuts in Italy	<u>18,000</u>	
Total	<u>147,400</u>	<u>147,400</u>
Balance remaining on hand Dec. 14 (estimated).....		28,600

*One bag equals 110 lbs. unshelled.

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FOREIGN NEWS ON WALNUTS

THE BORDEAUX WALNUT SITUATION

A backward spring followed by a period of warm, sunny weather during the last week of April has been favorable to the walnut trees in Southwest France this season, according to a report received in the Department of Agriculture from Consul Lucien Memminger at Bordeaux. In contrast with last year, when warm weather in March caused premature budding of the trees with subsequent serious damage to the crop by cold and rain, climatic conditions this year have been more nearly normal. Leafage on the trees began to appear during the last two weeks of April and the first flowering for formation of the fruit was expected to show itself early in May. Walnut growers generally express themselves as well satisfied with the fact that the budding of the trees has been slightly delayed this year since late budding lessens the risk of damage from unseasonably cold weather. In general the prospects for a good crop are considered much more hopeful than at the same date last year.

Abnormal conditions continue to prevail in the French trade in shelled walnuts owing to the partial failure of the French crop last year. Only 1,884,000 pounds of shelled walnuts were declared for export from the Bordeaux Consular district to the United States during the three months January - March 1927 as compared with 5,019,000 pounds during the corresponding period last year. The total quantity of shelled walnuts shipped from Bordeaux to the United States in the year 1926 was 10,496,000 pounds, a reduction of 1,314,000 pounds compared with 1925.

Shipments of 1926 crop

The first shipment of shelled walnuts of the 1926 crop from Bordeaux to the United States occurred on October 22, 1926. Shipments from Bordeaux to the United States from that date to March 31, 1927, as shown by the Consulate's records, were as follows:

Shelled Walnuts	Quantity	Value
<u>1926 Crop</u>	<u>Pounds</u>	<u>Dollars</u>
Of French origin.....	1,966,878	1,034,555
Of Roumanian origin.....	928,091	403,746
Of Turkish origin.....	178,750	82,904
Total.....	3,073,719	1,521,205

Local walnut merchants state that the shelled walnut industry at Bordeaux has never been obliged to import such large quantities of foreign nuts for cracking as has been the case during the 1926-1927 season, and that local market quotations for "Bordeaux Halves" have never before reached such high levels. From every standpoint the 1926-27 season is considered to have been very unsatisfactory for those engaged in the walnut industry and trade. The effect of the high prices was to reduce the demand from the United States and from other countries. Having paid high prices for their raw material, particularly at the opening of the season, packers were unable to offer the manufactured product at any considerable reduction without incurring serious losses. Early in November spot quotations for "Extra Halves" of the 1926 crop reached the unprecedented price of \$67.35 per 100 pounds. At the end of December the price had fallen to \$51.96 to \$53.48 per 100 pounds, at which level, with some slight variation, it remained until toward the end of March, 1927. "Invalides" and "Arlequins" during this period dropped from \$29.94 to \$28.67 per 100 pounds.

Recent fall in prices

Beginning in April, prices of Bordeaux shelled walnuts showed a pronounced downward tendency, "Extra Halves" falling to \$44.45 to \$48.01 per 100 pounds on April 2, and \$39.12 to \$44.45 per 100 pounds on April 16. "Invalides" and "Arlequins" have meanwhile fallen to \$21.34 per 100 pounds. The market is generally weak and there appears to be little demand. Some local firms offer "Extra Halves" c.i.f. New York at \$44.45 per 100 pounds and "Pièces" at \$30.23 per 100 pounds. Prices vary in accordance with terms and grades specified. Stocks on hand are believed to be small and it is not considered likely that shipments will continue to any extent after the end of May.

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UNITED STATES DEPARTMENT OF AGRICULTURE
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June 28, 1927.

F.S.
W-16

FOREIGN NEWS ON NUTS

FRENCH WALNUT CROP PROSPECTS

Reports from the walnut producing region of Southwest France indicate that the climatic conditions thus far this year have been very favorable to the production of a good crop, according to a report received in the Department of Agriculture from Consul Lucien Memminger at Bordeaux. The blossoming of the fruit occurred normally, in contrast to the conditions which so seriously affected the crop of the previous year. Since then the trees have continued to give every evidence of health and strength, indicating complete recovery, apparently, from any temporary ill effects of the previous unfavorable season.

The foliage is abundant and bright and healthy looking. The setting of the fruit is excellent and according to experts gives promise of a crop of good quality as well as a quantity equal to that of a good year. The fruit on an average has reached a size nearly equal to two-thirds of its full growth, but is as yet only in its early stages of formation.

At the present stage of growth, and provided conditions continue favorable, certain varieties of walnuts grown in this region, such as "Marbots" and "Cornes", should reach maturity and be ready for harvesting early in October. This would mean a fairly early crop, enabling shipments to be made in plenty of time for Thanksgiving. Although all danger of damage from frosts is now considered to be past, the success of partial failure of the crop is still dependent upon weather conditions and may be compromised, especially by excess of rain at harvesting time.

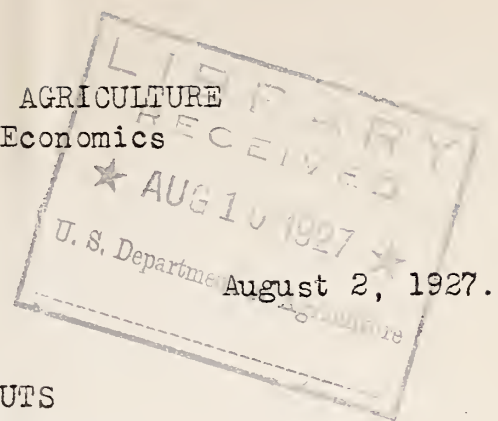
The good reports concerning the present condition of the crop come from practically all regions which produce walnuts handled by Bordeaux firms. In the Chaberte district the trees are said to be flourishing and there has only been a small fall of the fruit from trees exposed to frosts on hills or alongside streams. From the Charentes, Dordogne, and Correze districts, equally good reports are received.

Shipments of 1926 crop

A few shipments of shelled walnuts, mostly from cold storage stock, are now being made from Bordeaux to the United States, a considerable proportion of which is from Rumanian nuts of the 1926 crop, but there is now very little offering for shipment, although it is said that small consignments will continue to be made during the remainder of the season until the arrival of hot weather.

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FOREIGN NEWS ON NUTS

GOOD CHINESE WALNUT CROP EXPECTED

The Chinese walnut crop is expected to be as large as the good sized crop of last year, according to Tientsin trade estimates as cabled by Agricultural Commissioner Paul O. Nyhus to the Department of Agriculture. The nuts are of the usual size for this time of the year. The high prices have moved all stocks so that there is practically no carryover.

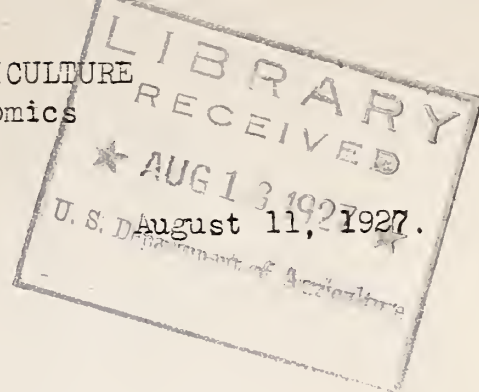
Chinese dealers' and foreign exporters' ideas as to prices are far apart, states Mr. Nyhus. The dealers are influenced by the high closing prices of last year's crop, while exporters are awaiting price developments in the United States before determining to what extent they can meet the high prices which are being discussed by the Chinese dealers. The delay in getting together on prices may tend to curtail early shipments of walnuts in the shell. It is expected that agreement on the prices of shelled walnuts may be reached at about 10 per cent above last year's opening prices.

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FOREIGN NEWS ON NUTS

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THE FRENCH WALNUT SITUATION

Prospects for a good walnut crop in France this year continue favorable, according to a report dated July 18, received in the Department of Agriculture from Consul Lucien Memminger at Bordeaux. The trees present a healthy appearance in all regions and are well laden with nuts, but there has been some damage by heavy rains, wind storms and hail. Reports that a great many trees were blown down by storms early in July appear to have been exaggerated. Conservative estimates are that possibly 1,000 trees were uprooted, particularly in the Dordogne section, with a loss perhaps of about 2,000 sacks of nuts as regards this season's crop, but this is not regarded as affecting the total crop to any extent, and some of the trees it is believed can be put in place again and will not be lost for next year.

Most of the damage from hail and storms appears to have been suffered in the Corne producing region and a shortage is expected in that variety. Some firms state, however, that the damage was not very great and that a fairly good crop can be expected. At the present rate of growth the Cornes should be ready for delivery in the New York market before Thanksgiving. The crop of Marbots was scarcely touched by the storms and promises very well. It is slightly ahead of normal in its state of growth and if all goes well the first shipments can be made about October 22.

A large crop of Chabertes in the Dauphine region appears to be in prospect, according to reports reaching the Bordeaux Consulate. The crop of walnuts for cracking purposes is expected to be about normal in quantity in most of the producing centers. As regards the effect of the hail storms on the quality of the crop as a whole, it is as yet too early to make any reliable estimates. In general, indications now point to a crop of good quality if the weather remains favorable.

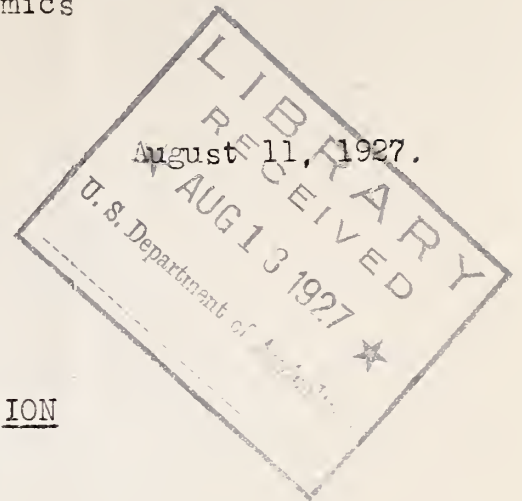
Prices for shelled walnuts as quoted in Bordeaux on July 16, in cases, were as follows: Extra Halves \$46.11 to \$47.89 per 100 pounds; Invalides \$24.82 to \$25.72; and Arlequins \$21.28 to \$23.06.

UNITED STATES DEPARTMENT OF AGRICULTURE
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FOREIGN NEWS ON NUTS

SOUTH ITALIAN WALNUT SITUATION



The walnut crop of South Italy is expected to be from 10 to 15 per cent larger than that of 1926, but the nuts will probably be smaller on account of the continued drought, according to a cable received in the Department of Agriculture from Consul General Homer M. Byington at Naples. Shipments to the United States of Mountain walnuts will commence about September 15 and of Sorrento nuts about September 30.

In a good year not more than 200,000 bags of saleable nuts are produced in Southern Italy and in 1926 not more than 175,000 to 180,000 bags were produced in that section, according to Mr. Byington. Exports to the United States begin as a rule during the second week in September when the first Mountain and Paesani nuts come to market. Sorrento exports never begin before the end of September.

The South Italian walnut crop of 1926 has been entirely disposed of. The United States took the bulk of the crop. In normal years only about 17,000 bags are sent to countries other than the United States, while about 18,000 bags are retained for local consumption.

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UNITED STATES DEPARTMENT OF AGRICULTURE
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F.S.
W-20

August 24, 1927.

FOREIGN NEWS ON NUTS

CONDITION OF THE RUMANIAN WALNUT CROP

Unusual and heavy frosts occurred in Bessarabia and Transylvania during the month of May, which seriously injured the walnut crop in those districts. According to a report dated July 30 received in the Department of Agriculture from Acting Commercial Attache Sproull Fouche, the total Bessarabian production is now estimated at 300 to 400 carloads of 10 metric tons (between 3,300 and 4,400 short tons). These two sections produce the majority of the walnuts of the country. The crop in the southern section is fair, not having been affected by the May frost. The most reliable estimates obtainable place this year's total Rumanian production at 40 to 50 per cent below that of 1926. The amount available for export is not expected to exceed 800 to 900 carloads as compared with 1,700 carloads in 1926.

The quality of the crop is reported to be unusually good due to the favorable weather conditions since May, and to the fact that the number of nuts per tree is small. It must be borne in mind that this is merely a preliminary estimate and that very considerable changes can take place before harvesting is completed.

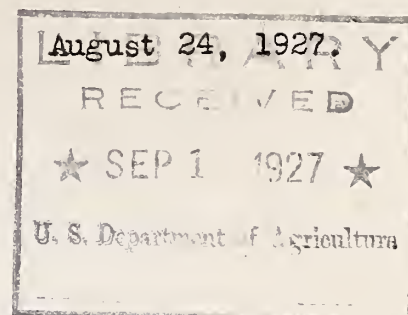
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F.S.
W-21

FOREIGN NEWS ON NUTS

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THE WALNUT INDUSTRY IN ITALY



Walnuts, while of some importance in Southern Italy, are not considered a major agricultural product of Italy. The crop is almost wholly gathered from scattered trees. The principal centers of production are in Southern Italy, especially in the Provinces of Naples and Salerno, where the industry is conducted on an export basis. The only Province in Northern Italy producing walnuts for the export trade is Turin. According to Consul General Homer M. Byington at Naples, a good normal crop in Southern Italy hardly ever exceeds 200,000 bags of 110 pounds each, of saleable nuts. The 1926 crop ranged from 175,000 to 180,000 bags as compared with 200,000 bags in 1925 and 350,000 bags in 1924.

About three quarters of the crop in Southern Italy is gathered from scattered trees and the remainder from orchards. The distance between the trees in the orchards varies from 20 to 30 feet. Walnut trees are often alternated in rows with peach trees. Vegetables are generally planted between the trees. Irrigation is practiced in some sections of the walnut producing area of Southern Italy but due to the scattered growth of the trees the practice is very limited.

The walnuts produced in Southern Italy are of two varieties, Mountain and Sorrento. The Sorrento nuts are generally grown on the plains while the Mountain varieties grow on mountain sides at an altitude of from 800 to 2,500 feet. The Mountain nuts are subdivided into Wild Mountain and No. 2 Mountain or Paesani nuts. The Sorrento walnut is considered the best type grown in Italy. This walnut originated on the plains of Sorrento but it is now cultivated in other parts of Southern Italy. Only Mountain varieties are grown in Northern Italy. The Mountain nuts of that part of the country are known as Piemonte nuts. The Sorrento walnut is larger than the Mountain nuts and is easily cracked with the fingers. These nuts are grown from grafted trees. The thick shell of the Mountain nuts requires mechanical means for cracking. No. 2 Mountain or Paesani walnuts have a smoother and more uniform shell than the Wild Mountain nuts.

Mountain nuts are all poled from the trees. They ripen earlier than the plain nuts which are generally allowed to fall from the trees after reaching maturity. The Mountain nuts are harvested as a rule from the end of August to the tenth of September. Sorrento nuts are harvested between September 10 and 20. The husks are removed from the nuts by hand and in several localities the nuts are then subjected to a bleaching process in a

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sulphuric solution. In the regions of greatest production in Southern Italy the nuts are first sun-dried, then husked, bleached and scoured with brushes. In some districts, however, the nuts are simply placed in the sun to bleach without chemical aid after the husks have been removed. In Southern Italy girls are employed for all but the heavier tasks in connection with the harvesting of the walnut crop. In Northern Italy, where the trees are almost always found in scattered, uncultivated groves on the mountain sides, the peasant proprietors and their families generally gather the nuts themselves and transport them to market after the usual process of preparation.

In the important producing areas of Southern Italy the growers often sell their crops on the trees or, after the nuts have been bleached or scoured, to the country merchants who dispose of them to the buying agents from Naples. As a general rule, however, the agent buys direct from the grower. The latter course is usually followed by the owners of the cultivated orchards. The crop is invariably sold by weight. The Italian walnuts are now always packed in jute bags containing 110 pounds. In former years there was a considerable demand for nuts packed in wooden cases containing about 125 pounds. The nuts are graded according to size in most districts. In the Naples district exporters of walnuts to the United States find it advisable to exercise more than ordinary care in regard to the quality of the nuts because of the requirements of the American authorities that 85 per cent of the nuts must crack "good". Such exporters demand an 85 to 95 per cent good crack of the growers.

By far the largest proportion of the Italian walnut exports come from Southern Italy. The United States takes the bulk of the export crop. In a normal year when the South Italian crop amounts to about 200,000 bags of 110 pounds, approximately 18,000 bags are retained for domestic consumption. Exports have been increasing rapidly since the war, indicating that the industry is expanding. Exports in 1926 totaled 18,767,000 pounds as compared with 18,459,000 pounds in 1925 and an average of 9,238,000 pounds for the five years 1909-13. The other export markets are mainly the United Kingdom, France, Germany, and Switzerland. The first shipments of the new crop are usually made around the middle of September. The heaviest shipments of nuts are made during the months October-December.

Prior to January 1926 the exports of shelled walnuts from Italy were insignificant. Since that time, however, efforts have been made towards establishing a walnut shelling industry in Southern Italy. Shelled nuts are now being shipped in tin cans after preparation by a patented process. The following tables give the exports of shelled and unshelled walnuts from Naples to the United States during the past two seasons, and total exports from Italy to all countries over a period of years.

WALNUTS: Exports from Italy, average 1909-13, annual 1922-1926

Exports to	Average 1909-13	1922	1923	1924	1925	1926
	1,000	1,000	1,000	1,000	1,000	1,000
	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>	<u>pounds</u>
United States	5,822	8,341	10,373	9,358	12,057	12,837
United Kingdom ...	1,011	1,103	2,046	927	1,057	1,500
Germany	220	-	-	3,345	1,443	434
France	556	870	351	760	1,786	1,897
Switzerland	484	665	668	815	620	200
Other countries ..	1,145	1,321	2,859	1,445	1,496	1,899
Total.....	9,238	12,300	16,297	16,650	18,459	18,767

Source: Statistica del Commercio Speciale di Importazione e di Esportazione.

WALNUTS: Exports from Naples to the United States

Season	Shelled		Unshelled	
	Pounds	Value	Pounds	Value
		<u>Dollars</u>		<u>Dollars</u>
1925-26:				
September	a/	a/	1,515,662	202,324
October	a/	a/	6,307,915	1,033,343
November	a/	a/	1,291,103	195,152
December	a/	a/	133,207	17,414
January	41,553	9,248	9,565	662
February	11,039	1,127	55,354	5,573
March	75,913	11,041	127,927	11,567
April	5,510	2,549	----	---
May.....	36,737	7,096	41,231	3,672
June	3,913	844	88,000	8,037
1926-27:				
September	19,906	4,732	2,537,182	319,477
October	18,463	4,701	8,820,970	1,404,910
November	94,322	11,603	1,001,635	157,594
December	17,292	5,892	26,651	7,842
January	29,842	8,523	440	73
February	24,950	6,945	---	---
March	9,479	2,041	5,060	2,090
April	7,054	1,696	---	---

Source: Consul Ernest E. Evans at Naples.

a/ Included in unshelled.

THE HISTORY OF THE UNITED STATES OF AMERICA

The history of the United States of America is a story of growth and change. It begins with the first settlers, who came to the continent in search of a new life. They found a land of vast resources and opportunities, but also one of challenges and hardships. Over the years, the United States has grown from a small colony to a powerful nation, with a rich and diverse culture. The story of the United States is a story of the American dream, of the pursuit of happiness and freedom. It is a story of the struggles and triumphs of a people who have built a nation that stands as a beacon of hope and progress for the world.

The United States has a long and proud history, one that is filled with many great achievements. From the first settlers to the present day, the United States has been a land of innovation and discovery. It has been a land where the impossible has become possible, where the dreams of a few have become the reality for many. The United States has been a land of freedom and opportunity, a land where every person has the chance to make their own destiny. It is a land that has inspired the world, a land that has shown the power of the human spirit.

The history of the United States is a story that is still being written. It is a story of a nation that is constantly evolving, a nation that is always moving forward. The United States is a land of endless possibilities, a land where the future is always within reach. It is a land that has the potential to change the world, a land that has the power to make a difference. The history of the United States is a story of hope and possibility, a story that is sure to continue for many years to come.

UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

September 2, 1927

F.S.
W-22

FOREIGN NEWS ON NUTS

THE RUMANIAN WALNUT INDUSTRY

Estimates of the quantity of walnuts produced annually in Rumania vary greatly. When it is realized that the number of walnut trees in Rumania cannot be estimated and that owing to the lack of reliable data the Rumanian Ministry of Agriculture does not publish statistics concerning the walnut crop, it is evident that any definite statement in this regard cannot be made. The most reliable estimates received from the trade places the 1926 crop at approximately 55,000,000 pounds, according to Mr. Charles A. Livengood, American Trade Commissioner at Rome. Of that quantity approximately 46 per cent was estimated to have been produced in Bessarabia and Bukowina, 37 per cent in Moldavia and 17 per cent in Transylvania. Although official statistics of production are not available, Rumania's importance as a producer of walnuts has greatly increased through the acquisition of Transylvania and Bessarabia, particularly the latter.

Generally careless methods of cultivation and preparation combined with a poor local demand are largely responsible for the comparative unimportance of the English walnut industry in Rumania. The possibility of building up a good foreign demand for walnuts, however, has stimulated interest in the industry during the past few years. The leading producing districts are in Bessarabia, formerly a part of Russia; in Moldavia, the North Central part of the old Kingdom of Rumania, and in Transylvania, formerly a part of Hungary. The Transylvania growers, many of whom still maintain their pre-war connections with Hungarian exporters, send the greater part of their crop through that country to Czechoslovakia, Germany, Italy and France. The principal centers for buying from speculators are in Chisinau, Bucharest, Braila, Galatz and Constantza. The last three markets, particularly Constantza, are the leading ports of export.

Walnut trees are rarely planted in orchard form in Rumania. Trees are numerous in the hill regions where nearly every peasant has several in his yard or pasture and there are also many trees in the wine districts. As a general rule very little care is taken of the trees. Irrigation is not employed and grafting or budding is very rare. The nuts are of a common variety indigenous to their respective regions. Cropping between trees is rarely practiced. Owing to the absence of grafting or any fixed policy of seed selection in the three walnut producing sections, it is impossible to distinguish the varieties of one region from those of another, except that the walnuts found in Transylvania have a thinner shell than the Moldavian or Bessarabian nuts.

The critical maturing period is from August 15 to September 15 when dry weather is required to produce a kernel of good quality. The harvest begins in September and continues through October. The nuts are poled off the trees from time to time during this period, those remaining at the end of October being harvested at one time. The Bessarabian crop is usually gathered early in September. The Moldavian harvest begins around the middle of September, while the Transylvanian harvest begins around the first of October. The outer husks are removed by hand. No methods of bleaching or curing are used as yet. Exporters have experimented in the past with the sulphur process of bleaching, but, finding that the process damaged the quality of the meat, it was abandoned. Harvesting is done by the farmer and his family.

During the harvest season buyers from the neighboring towns go into the country and buy nuts which they sell to jobbers in the principal centers of domestic consumption or to export firms. The first sale always takes place at point of production and not through commission merchants in the towns. Sales are made on a weight basis, and rarely, if ever, by count. The original purchase is generally made by local traders or speculators. Buying for export firms is often done by agents of such firms.

Walnuts in the shell are packed for shipment in sacks or bags generally containing 110 pounds each. Cracked nuts are packed in cases having an inner lining of oiled paper and containing as a rule 55 pounds net. Until recent years very little was done in the line of grading unshelled nuts and for that reason many nuts destined to foreign markets were refused because they contained too large a proportion of spoiled nuts. Such grading as is now carried on consists of picking out the blackened nuts by hand, and one exporter reports that he has a mechanical blower to eliminate the nuts that are underweight. No effort is made to grade the nuts according to sizes and in nearly all cases they are shipped unbleached. One exporter interested in bleaching, grading and cracking walnuts, has stated that whereas this costs $2\frac{1}{2}$ cents per pound in the United States, the cost in Rumania would not exceed one-half cent per pound, according to a report made by former Vice Consul Edward Caffery at Bucharest.

The neighboring countries, such as Czechoslovakia, Austria, Turkey, Germany, Yugoslavia, Hungary, Poland and France are the principal purchasers of Rumanian walnuts. Exports during 1925, the latest year for which statistics are available, amounted to 28,000,000 pounds as compared with 38,000,000 pounds in 1924. The largest and steadiest demand for Rumanian walnuts comes from Poland and Hungary although Austria and Czechoslovakia also import considerable quantities. Rumanian prices depend largely on the walnut crop in France and Italy. Generally speaking American importers prefer to do business with the well established firms in Italy and France and avail themselves of the Rumanian market only if it presents a considerable price advantage over the first two mentioned sources of supply, or if poor crops in those countries force them to enter the Rumanian market, according to Vice Consul George C. Arnold at Bucharest. The American

demand is principally for shelled walnuts. Although Braila and Galatz as well as Constantza are ports of shipment, the last mentioned port is the only one from which there is a regular service to the United States.

Shipments of unshelled nuts are heaviest from October 15 to December 15. Shipments of shelled walnuts usually begin early in December and reach their highest point early in February or March. It takes from three to four weeks for shipments of Rumanian walnuts to reach the New York market. Unless favorable weather conditions prevail to permit sufficient drying of the nuts during the last weeks of September and up to the 15th of October, the new crop of nuts cannot be delivered in the American market early enough for the Thanksgiving trade. Practically all of the Rumanian walnuts exported to the United States are sold C. and F. New York and are shipped either direct from Constantza or via Hamburg.

While most of the exports to France and the United States are shipped via the port of Constantza, shipments to France early in the season are often made through the Danube River points of Braila and Galatz because of the proximity of these ports to the Bessarabian and Moldavian producing areas which, as previously mentioned, offer an earlier harvest, according to Consul Richard B. Haven at Constantza. Vessels bound for France are usually available in these ports which eliminates the necessity of an extra railway fare to Constantza. Early shipments to the United States are usually made by rail to Trieste, Italy, or through Hamburg for trans-shipment to New York because there are no direct sailings from Constantza to New York before November. As a general rule American buyers write in their contracts a clause requiring shipments to be made in passenger vessels in order to assure delivery in time for the holiday trade.

No separate statistics are available as to the production of shelled and unshelled walnuts. Eight or ten cracking and shelling establishments, however, are maintained at Chisinsu, Calarasi, Jassy, Braila, Galatz and Constantza. Women and children working at from \$0.15 to \$0.45 per day are employed in these plants by speculators and exporters for cracking the nuts with wooden hammers, sorting the shelled nuts into halves, quarters and pieces and packing the meats in paper lined boxes. This is generally done only after firm orders have been received and there is no pretense of the maintenance of an up to date or sanitary plant, according to a report from former Vice Consul Edward Caffery at Bucharest.

WALNUTS: Imports into the United States from Rumania, 1921-26

Year	Shelled		Unshelled	
	Quantity	Value	Quantity	Value
	Pounds	Dollars	Pounds	Dollars
1921	---	---	306,834	22,194
1922	163,249	27,275	3,726,072	322,295
1923	61,298	11,887	307,484	20,278
1924	301,811	52,405	167,088	6,968
1925	210,934	47,732	1,023,815	108,051
1926	633,249	125,514	2,587,751	259,928

Source: "Commerce and Navigation of the United States."

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FOREIGN NEWS ON NUTS

September 21, 1927

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WALNUT CROP PROSPECTS IN SOUTHWEST FRANCE

Although the weather in August was unusually rainy and cool, the prospects for an abundant walnut crop in Southwest France this autumn are still considered favorable, according to a report dated August 26 and just received in the United States Department of Agriculture from Consul Lucien Memminger at Bordeaux. Provided good weather prevails up to the time of the harvest, a very good crop is anticipated both as to quality and quantity. Excessive rainfall in the middle of August is not believed to have damaged the nuts, as they were well protected in their outer husks and not yet matured.

The crop promises to be somewhat early, according to reports from the growing area, which state that "Cornes" may be ripe at the end of September. This would enable the shipments of table walnuts to be made in ample time to reach the United States for Thanksgiving. First shipments are expected to begin in the latter part of October, but the proportions likely to be available for early shipments cannot be estimated at present as so much depends on the absence of rain at harvest time for the proper drying of the nuts after gathering.

Observers in the field report that the trees are healthy in appearance and that there is an abundant setting of the fruit. The quality of the nuts cannot be determined at the time of the Consul's report, but within a fortnight green nuts were expected to be ready for local table use in their semi-ripened condition at which period experts are usually able to ascertain the quality of the crop. It is generally stated that warm, dry weather within the next fortnight is highly desirable for the proper development of the crop, while lack of rain during and immediately after the harvest is an important factor in facilitating the drying of the nuts and improvement of their keeping quality.

Market prices for the new crop are not yet definitely fixed. The American market is exhibiting considerable interest but buyers appear to be in a waiting attitude. From one source of information the following were stated to be quotations of local sellers for the New York market: Marbots, \$13.78; Cornes \$13.42, per 100 pounds, cost and freight New York, shipment at end of October. Another merchant quoted \$13.34 for Marbots and \$12.45 for Cornes for shipment the first fortnight in November.

With reference to shelled walnuts, "cerneaux", of the new crop, a current quotation has been \$44.45 per 100 pounds, cost and freight New York, for Extra Halves, in cases, shipment early in November, but this price appears not to have been maintained, as from other sources the following were given as tentative prices, cost and freight New York, for Extra Halves, in cases, \$42.67, shipment October 27: \$40.89 shipment November 5; \$35.56 shipment November 12. As previously stated, prices are still unsettled and subject to change in accordance with conditions between now and the harvest.

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FOREIGN NEWS ON NUTS

THE 1927 NAPLES WALNUT CROP

The 1927 walnut crop in the Naples consular district is reported as being very good in quality and from ten to fifteen per cent larger than the 1926 crop, when approximately fourteen millions of pounds were harvested, according to a report dated September 7 and received in the Department of Agriculture from Consul William W. Schott at Naples. The trees are in excellent condition and vigorous, notwithstanding the long drought which prevailed during the late spring and summer. The nuts are not expected to be of full normal size, however, and their maturity has been somewhat delayed, but the period of delay has been reduced by recent light rains. Harvest is anticipated between the middle and the end of September.

Small stocks amounting to probably less than 110,000 pounds were on hand at the beginning of September. They are all Sorrentos and are of inferior quality. A prohibitive asking price has prevented their sale.

Exports

Statistics on the exportation of walnuts for the year 1926 are not available. It is estimated that the crop totaled approximately 14,000,000 pounds, most of which was absorbed by the United States. In 1925, 86.8 per cent of the exports were destined for the United States while in 1926 approximately 95 per cent of the total was shipped to this market.

The following table shows the declared exports to the United States for the years 1923 to 1926, and the first seven months of 1927:

<u>Year</u>	<u>Pounds</u>	<u>Value</u>
1923	9,938,553	\$1,056,795
1924	11,158,265	1,633,663
1925	10,191,541	1,621,181
1926	13,272,050	2,001,022
1927(1st 7 months)	95,503	25,723

Early in September the local market was very much depressed. The re-valuation of the lire and the high prices asked have made it difficult to compete with other markets and no interest is being manifested by American and other foreign importers. Prospects of large crops in California and in France have served to make the position of the Naples dealers untenable.

Prices

Dealers quote the following asking prices for the new crop:

Sorrento - Lire 475 per quintal (\$0.118 per pound)
Paesani - Lire 375 per quintal (\$0.093 per pound)

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W-25

FOREIGN NEWS ON NUTS

September 28, 1927

RUMANIAN WALNUT CROP PROSPECTS FOR 1927

Latest and most reliable estimates of the Rumanian walnut crop prospects for 1927 concur in a figure of 26,500,000 pounds of unshelled nuts which represents something less than the normal yield in recent years of some 33,000,000 pounds and falls about 33 1/3 per cent short of the abnormal yield of some 40,000,000 pounds in 1926, according to a report dated September 1, just received in the Department of Agriculture from Consul J. Rives Childs at Bucharest.

The anticipated crop of 26,500,000 pounds has been confirmed to the Consulate by the two leading walnut exporters in Rumania, independently of one another who, incidentally, also agree that the crop of 1926 amounted to about 40,000,000 pounds, states Consul Childs.

Unfavorable weather conditions in 1927

The anticipated deficiency in the Rumanian walnut crop is largely due to the unseasonably cold weather experienced in late April and the first two weeks in May which caused considerable damage to the buds of the trees. Since that time, however, the weather has been very favorable to the proper development of the nut and, provided there is not too much rain during the ensuing month or during the critical maturing and drying period which usually takes place from August 15 to October 15, the anticipations regarding the crops as here given should be fulfilled.

The quality of the crop is reported to be generally superior to that of the 1926 crop and will mature in all probability some two weeks earlier than usual or during the first days of October when the first exports of the new crop will be made.

Exportable surplus

Practically the entire Rumanian walnut crop is available for export as internal consumption does not exceed annually more than some 2,200,000 pounds. However, exports are limited more by the foreign demand than by production. No carry-over is available from the 1926 crop as the country was stripped bare of walnuts early in the spring of 1927 by the insistent demand from abroad. Consequently, the total quantity available for export from the 1927 crop is not expected to exceed 24,251,000 pounds.

Opening prices

Encouraged by the exorbitant prices paid in 1926 by French purchasers in Rumania in view of the insufficiency of the French walnut crop last year,

local producers have become very exigent in their demands. A few contracts have been concluded at from \$0.07 to \$0.07 $\frac{1}{2}$ per pound, delivered at the orchards. On the basis of this price, natural walnuts, unbleached and not hand-picked, would command not less than \$0.11 $\frac{1}{2}$ the pound, c.i.f. New York. In view of such prices, it is the opinion of the trade that the Rumanian market will find it difficult to compete with France where the crop is reported to be unusually abundant. At the present time the American market is showing itself very reserved and, so far as is known, no contracts have been concluded as yet by American buyers in Rumania.

Exports to the United States

Declared exports of walnuts from Rumania to the United States (American consular statistics) in 1925 amounted to a total of 2,943,000 pounds valued at \$348,000, comprising unshelled walnuts in the amount of 2,590,000 valued at \$271,000 and shelled walnuts in the amount of 353,200 pounds valued at \$76,840. In 1926 such exports amounted to a total of 3,626,000 pounds valued at \$486,000 consisting of unshelled walnuts in the amount of 2,893,000 pounds valued at \$286,700 and shelled walnuts in the amount of 734,000 pounds of a value of \$199,800.

During the first six months of 1927 walnuts in the amount of 638,000 pounds valued at \$234,260 were exported from Rumania to the United States, consisting exclusively of shelled nuts. All of these exports went forward before April 17, 1927 and consisted of the 1926 crop.

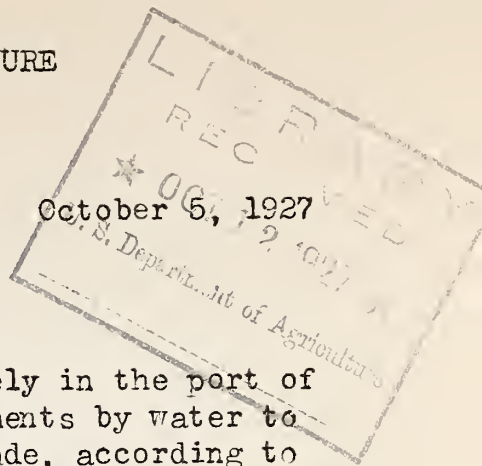
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W-26

FOREIGN NEWS ON NUTS

THE WALNUT INDUSTRY IN CHINA 1/

October 5, 1927



The walnut business of China is centered largely in the port of Tientsin through which fully 75 per cent of the shipments by water to foreign countries and to other Chinese markets are made, according to a report received in the United States Department of Agriculture from Mr. Paul O. Nyhus, the American Agricultural Commissioner in China. Walnut production on a commercial basis is confined largely to the three northern provinces of Chihli, Shantung and Shansi and to the central and western provinces of Honan and Szechwan. Practically all of the nuts marketed in the northern districts are handled through the port of Tientsin while Hankow on the Yangtze River, several hundred miles southwest of Tientsin, serves as the principal marketing center for the crops in the central and western provinces.

While walnuts are grown extensively in Northern China, the possibilities of expanding the industry and of developing the export market are little appreciated. In many parts of Northern China, especially where transportation facilities are still primitive, the natives have no idea of the commercial importance of the nuts although many trees are available for cultivation. The trees in most cases grow on mountain slopes and on hill sides, on land not particularly adapted to the growing of other crops. No effort is being made to increase production or planted areas. In fact walnuts seem to be of secondary importance to the production of fruit which is grown on a large scale in the same regions producing walnuts.

Quality and varieties

The best grades of walnuts produced in China are grown northeast of Tientsin along the coast and north of Peking in the province of Chihli, states Mr. Nyhus. The nuts grown in these districts have a high oil content and are known as paper shell walnuts. The Fenchow district in the province of Shansi also produces a walnut of high quality. The nuts produced in Shantung on the other hand are comparatively inferior in quality and grow wild throughout the province. Walnuts are nowhere cultivated systematically except in the few sections of Chihli and Shansi where the high grade paper shell nut is grown.

Varieties and dates of maturity vary with the different localities that contribute to the export trade. The Chinese trade in general, however, recognizes three varieties of walnuts, the double-shelled, the medium-shelled and the paper shelled. The double-shelled variety is the lowest in price. The medium-shelled variety is the one produced in largest quantity, while the paper-shelled variety, which commands the highest price, is not extensively grown. The paper-shelled variety is used chiefly for the September and October "in shell" shipments to the American market. The crop from the hills west of Peking comes to Tientsin in October. The crop of the Shansi province, mostly walnut meats, reaches the Tientsin market in November.

1/ Based on report of August 3, 1927 from Agricultural Commissioner Nyhus, supplemented by reports from American Consular officers in China.

Hulling and bleaching

The nuts are picked by hand usually two or three weeks before they are ripe and are piled in long heaps on the ground. The piles of nuts are covered with straw and left for a few days until the outer hull has loosened when they are husked by hand, aided by a small iron instrument. The hulled nuts are then washed to remove the small particles of husk from the shell and are then dried in the open air and packed for shipment to the commercial export centers. The shells are sometimes bleached in Tientsin before shipment. The bleaching is done by the exporting firms. A chlorine solution is usually employed although sulphur vapor is sometimes used.

Marketing

In collecting walnuts the Tientsin exporters frequently send their own representatives to the growers and contract for the crop on the trees. Cash is always paid for purchases of this kind. As a general rule, however, the local dealer at the beginning of the harvest season contracts with the farmers for the crop, and later sends it to Tientsin, Hankow, and other ports, where wholesale dealers take it over. Exporters believe that the producers in general get but little benefit from high prices in the port cities and that complete ignorance on the part of the farmers in the interior of export prices permits hawkers and collectors in the rural districts to buy at a low uniform price from year to year, states Mr. Nyhus. The dealer class profits and a large volume of exports are brought about, when prices are high, by the extra effort of dealers in getting all the stocks out from the interior and in recent years by assuming additional risks of transportation and safety of cargo.

Cracking

Two methods of cracking are employed known as wet cracking and dry cracking. Wet cracking is usually done by women and children and is followed exclusively in the interior. The process consists of soaking the nuts in water for about two days, after which they are cracked with wooden or iron hammers and the meats removed with wooden or iron nut picks. The wet nuts open more easily than the dry cracked and the percentage of halves obtained in the wet process is much larger. Water-cracked meat, however, will not keep as long as dry-cracked meat and the taste of the meat is inferior to the dry-cracked. Owing to the frequent losses in shipping wet-cracked meat, the number of shippers dealing in that kind of walnut meat is gradually declining.

Dry-cracking is practically confined to the warehouses in Tientsin owned by dealers and exporters, states Mr. Nyhus. In the dry cracking process the nuts are thoroughly dried before cracking and the meat that sticks to the shells is removed by scowers. The entire process is done by hand, principally by women and children. The meat obtained by this method is of better quality and taste and will keep much longer than the wet-cracked. Dry-cracked meat is produced under far more sanitary conditions than the wet-cracked.

Packing and grading

Since grading and sorting for size and quality of pieces is chiefly performed by exporters, various grades are packed to meet the requirements of different channels of the trade, states Mr. Nyhus. The meats in general, however, are sorted and graded according to size of the pieces and color, being graded into halves, quarters and pieces and also into light, medium, and dark amber. The meats are piled on long tables and are sorted by children into baskets holding the various grades. These baskets are shaken to remove any dust and are then dumped into larger baskets. The meats are then placed into dry, odorless, wood cases which hold 55 pounds net and are lined with waxed paper, states Mr. Nyhus. The cases are then weighed and brought to the standard weight after which the lids are nailed on and the cases are marked and piled up ready for shipment. Lots of standard assortment are also made up consisting of one-third each of halves, quarters and pieces. About half of the kernels exported from Tientsin are received as kernels from the interior, states Mr. Nyhus. The kernels arrive in cases and are sorted in the local godowns and repacked for the export trade, the cracking having been done in the farm villages. Because of the numerous and scattered outlying districts, it is practically impossible to get an idea of the degree of sanitation practiced by the natives in cracking walnuts in the interior. Conditions in Tientsin, however, where the nuts are cracked under the supervision of the export firms, are better from the standpoint of sanitation than in the outlying districts.

Export trade

The first shipments of Chinese walnuts to a foreign market were made in 1911. The walnut export trade of China has been steadily increasing in importance since that time. Exports to foreign countries during 1925, the latest year for which official Chinese trade statistics are available, amounted to 7,529,000 pounds of walnuts in the shell and 5,217,000 pounds of walnut kernels. The United States takes approximately 50 per cent of the "in shell" exports to foreign countries. All "in shell" shipments to the United States are graded over 1-1/8 inch or 1-1/4 inch square hole screens, and differences in price of 1/8 to 1/4 cents per pound obtain between light and dark color grades, states Mr. Nyhus. The bulk of the walnuts in the shell is exported in October so as to be on the American market for the Thanksgiving and Christmas holidays. As in the case of the exports of "in shell" walnuts, the United States takes the bulk of the exports abroad of walnut kernels. In fact, the strength of the United States demand for walnut kernels largely determines the price situation in the Tientsin market. The other important export markets for walnuts are Japan, Hongkong, Canada and British India.

The exportation of walnuts from Tientsin is in the hands of local import and export houses who act as buying agents or who have contacts in foreign countries representative of established outlets for their offerings. Dealers in walnuts in the United States at times send purchasing representatives to China but the success of such a plan is problematical

for the reason that such representatives are not usually qualified to manage the numerous details incident to securing cargo and effecting shipments. The result is that the mission usually terminates by the forming of a connection with some well established Chinese export firm. Another consideration in this connection is that all local export houses have their compradores who deal directly in the purchasing of walnuts and peanuts from native growers. The compradores are in a position to handle this phase of the business with greater benefit to the buyers than are foreign representatives who go to China for that purpose, as the latter are unfamiliar with the Chinese language and customs, and as a result have to contend with the many disadvantages that arise in connection with buying, effecting shipments from the interior, and in general such preparations as are incident to making shipment to buyers abroad.

The Chinese exports of walnuts in the shell to foreign markets and to other Chinese ports during the five years 1921-25 averaged 10,152,000 pounds annually, according to the Chinese Maritime Customs. Exports of walnut kernels during the same period averaged 5,440,000 pounds annually. The Tientsin exporters estimate that walnuts in the shell yield approximately 30 per cent of their weight in kernels. On that basis the average exports of walnut kernels represent the equivalent of 18,133,000 pounds of walnuts in the shell diverted annually to the walnut kernel trade. The total Chinese walnut export trade on an "in shell" basis during these five years averaged 28,285,000 pounds annually. A further analysis of the figures reveals that approximately 65 per cent of the total export crop is annually set aside for the walnut kernel trade. In the absence of any official production statistics, it may be concluded that the export and interport walnut crop for all of China averages around 14,000 short tons annually. The actual crop is undoubtedly very much larger, the quantity shipped from year to year depending upon the efforts of the dealers in getting the nuts out of the interior.

The following table shows the arrivals and exports of walnuts from Tientsin during recent years.

WALNUTS: Movement into and out of Tientsin, 1923-24 to 1925-26

Movement	:	1923-24	:	1924-25	:	1925-26
	:		:		:	
	:	<u>Pounds</u>	:	<u>Pounds</u>	:	<u>Pounds</u>
Arrivals:	:		:		:	
In shell	:	9,225,731	:	10,941,731	:	9,365,331
Shelled	:	3,045,333	:	3,094,000	:	5,415,465
Exports:	:		:		:	
In shell	:	3,400,800	:	10,654,597	:	7,914,200
Shelled	:	5,675,599	:	4,897,299	:	5,431,100

Source: United States Consulate General at Tientsin.

Direct steamers from Tientsin to the States are irregular, so that many shipments are routed via Shanghai or Japan. The ocean rates from Tientsin to the Pacific Coast are \$12 (gold) per ton for "in shell" and about \$26 (gold) a ton for "meats", the latter rate depending upon space required.

The following table shows the quantity of walnuts imported into the United States from China during recent years.

WALNUTS: United States imports from China, 1922 to 1926

Year	In shell		Kernels	
	Pounds	Dollars	Pounds	Value
1922	5,965,883	502,030	2,392,729	517,976
1923	1,551,443	113,056	1,430,432	267,222
1924	4,299,399	331,656	1,924,096	294,203
1925	4,598,787	361,390	3,564,239	744,213
1926	5,387,107	430,935	3,439,046	621,483

Source: Commerce and Navigation of the United States.

Price situation and 1926-27 prospects

A year ago "in shell" prices opened at about 8-1/4 cents (gold) per pound, c.i.f. Pacific Coast with the bulk of the movement at about 9 cents, according to Mr. Nyhus. Meats opened at about 21 cents (gold) per pound c.i.f. Pacific Coast but advanced sharply and most sales were made at 24 to 28 cents for lots made up of one-third each of halves, quarters and pieces. In the spring prices reached 32 cents and higher. It was a disastrous season for exporters who made early contracts with the States and an extremely profitable one for many Chinese dealers and exporters who laid in stocks at early season prices. The walnut exporters in China are mostly foreigners who buy from the Chinese dealers in Tientsin.

The Tientsin walnut trade believes that this year's crop will prove as large as last year's good crop, according to a cable dated September 23 from Agricultural Commissioner Nyhus. The nuts are expected to be somewhat smaller than last year but the quality will be up to average. Chinese dealers continued to be influenced by last year's high prices and in the latter part of September were still holding out for prices above those offered by American importers. There had been practically no shipments from Tientsin at that time but new stocks were arriving daily from the interior. Exporters believe that prices must come to the point that will permit of business with the United States on a basis of 7-1/2 cents gold, per pound, c.i.f. Pacific Coast for walnuts in shell and to 22 cents per pound for kernels. The present low exchange rate of silver in terms of gold will convert United States prices into relatively higher prices in terms of Chinese silver, which fact will tend to offset to some extent the high prices asked by the Chinese dealers.

WALNUTS: Shipments from Tientsin, 1924-25 to 1925-26

Month	In the shell					
	1924-25		1925-26		1926-27	
	Total Exports	Exports to the United States	Total Exports	Exports to the United States	Total Exports	Exports to the United States b/
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
September	260,933	132,000	328,400	300,000	581,200	215,100
October ..	4,526,132	)	3,198,300	1,946,570	5,823,300	4,579,100
November ..	1,799,066	)4,925,000	741,200	2,750	850,400	231,000
December ..	1,312,666	)	610,300	42,900	559,600	321,000
January ..	1,004,700	796,900	402,700	---	a/	200,000
February ..	596,800	440,900	534,400	200,000	a/	100,000
March	529,300	322,566	346,800	---	a/	5,200
April	269,000	16,700	357,600	3,300	a/	----
May	151,500	70,030	93,200	---	a/	----
June	72,000	---	146,500	---	a/	----
July	40,500	---	382,500	50,000	a/	----
August ...	92,000	---	272,300	---	a/	----
Total ..	10,654,597	6,704,096	7,914,200	2,445,520		5,651,400 b/
Kernels						
September	800	---	124,000	---	26,300	----
October ..	194,800	---	382,300	175,725	199,200	179,300
November ..	470,133	1,288,911	678,900	508,080	1,438,000	1,360,150
December ..	992,666	---	870,800	721,160	3,072,300	2,568,550
January ..	932,500	755,245	663,300	530,290	a/	2,049,025
February ..	717,700	730,460	664,000	585,240	a/	969,680
March	813,100	553,157	683,300	574,715	a/	1,247,710
April	332,300	322,455	638,000	535,125	a/	666,385
May	325,900	223,495	364,800	316,900	a/	144,610
June	70,400	39,710	159,100	30,525	a/	8,800
July	42,000	---	107,300	---	a/	----
August ...	5,000	---	94,300	9,900	a/	----
Total ..	4,897,299	3,913,433	5,431,100	4,037,660		7,194,240 b/

Source: Compiled from statistics forwarded by the United States Consulate General at Tientsin.

a/ Statistics not available.

b/ To July 1, 1927.

WALNUTS: Exports from China to foreign markets, 1920 to 1925

Exported Abroad	1920	1921	1922	1923	1924	1925
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
<u>In Shell</u>						
United States ..	791	9,773	2,152	1,082	4,479	3,754
Hongkong	749	643	636	1,121	883	952
British India ..	293	239	319	313	218	255
Japan	599	3,873	563	574	1,279	1,542
Canada	152	135	276	260	549	941
Other countries:	21	123	66	286	176	85
Total	2,615	14,791	4,012	3,636	7,584	7,529
<u>Kernels</u>						
United States ..	2,185	2,040	1,608	1,369	2,113	3,617
Japan	844	668	703	322	614	756
Canada	247	750	779	689	808	729
Other countries:	39	21	48	44	237	115
Total	3,315	3,479	3,138	2,424	3,772	5,217

Source: China Maritime Customs.

WALNUTS: Shipments by ports to other parts of China and to foreign markets

Exports from	1920	1921	1922	1923	1924	1925
	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
<u>In Shell</u>						
Tientsin	4,574	14,027	5,441	5,368	8,790	8,724
Chefoo	201	139	77	66	117	45
Kiaochow	1,004	1,154	512	436	1,079	1,214
Hankow	12	141	197	154	145	344
Tengyneh	283	221	304	290	201	235
Other ports ...	169	137	80	78	848	195
Total	6,243	15,819	6,611	6,392	11,180	10,757
<u>Kernels</u>						
Tientsin	2,409	3,921	3,206	2,100	3,925	5,295
Hankow	1,661	1,279	1,636	1,701	1,800	1,981
Other ports ...	149	44	117	110	12	67
Total	4,219	5,244	4,959	3,911	5,737	7,343

Source: China, Maritime Customs.

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WALNUT CROP PROSPECTS IN BORDEAUX AREA

Prospects for a French walnut crop of normal quantity were still considered favorable on September 16, 1927 by Bordeaux firms, based upon advices received from their observers in the field, according to a report received in the Bureau of Agricultural Economics from Consul Lucien Memminger at Bordeaux. This refers particularly to the walnut producing regions in the South and Center with which the Bordeaux firms have contacts and does not apply to the Grenoble district concerning which little information is available in Bordeaux at the present time.

After an unusually rainy and cool August the weather in the Central and Southern producing regions took a decided turn for the better in the first half of September. As the nuts are now (September 16) nearly ripe and some of those prematurely developed have begun to fall from the trees, it is generally taken for granted that unless something unforeseen occurs, practically all of the crop now on the trees will be harvested. Based on present appearances, therefore, experienced observers have expressed the opinion that, as regards quantity only, the walnut crop of this region will equal that of an average year.

With reference to quality it is considered as yet too early to form an opinion. In this respect so much depends on the climatic conditions between now (September 16) and the completion of the harvest that it is believed to be unsafe to attempt an estimate. If the weather should continue favorable within the next two or three weeks, without any considerable quantity of rain and a lack of storms to cause the nuts to fall prematurely, there is promise of a good crop in quality as well as in quantity.

Crop not unduly delayed

A representative of an important walnut firm in Bordeaux, who has lately been traveling through the walnut region, reports that the crop as a whole was progressing favorably and on September 16 was slightly ahead of normal, which would enable cracking of the early maturing nuts to begin on a small scale during the last week of September, states Consul Memminger. This informant stated that while the quality appeared defective in certain districts, this condition was local and could not be considered as general. In his opinion the prospects are good for harvesting of table walnuts slightly ahead of normal if favorable weather conditions continue to prevail.

A broker who is considered an authority on production in Central and Southern France stated that the crop of Marbots promises to be above the average; Cornes about average or slightly less, and cracking nuts about average. He gave as his tentative estimate of the probable tonnage for the 1927 crop of the two varieties of table walnuts chiefly produced in the Bordeaux region: Marbots, 100,000 sacks of 110 pounds each, and Cornes, 50,000 to 65,000 sacks of 110 pounds each.

This broker stated that although production of Marbots formerly greatly exceeded that of Cornes, their tonnage has been about equal in recent years, namely about 75,000 sacks each, but this year, in his opinion, the yield of the Marbot trees, on account of special conditions, seems likely to be more abundant per tree than that of Cornes. Marbots come especially from the Department of Lot and Correze and the hilly country east of Brive, while the rougher shelled and slightly later maturing variety known as Cornes, is grown mostly along the several small river valleys between Brive and Perigueux in the Dordogne, and thence westerly. America buys both of these table walnuts but mostly Marbots, which also are preferred in Germany, whereas the Cornes are a favorite in the English trade.

The foregoing estimates as to quantity of production of Marbots and Cornes in normal years cannot be checked by statistics from any official agency as none such relating to production by specified varieties are available but are merely quoted by way of indication. According to the opinion expressed by another broker, the normal production of Marbots in a good year is 125,000 sacks and Cornes 80,000 sacks.

Exports from Bordeaux area

The total walnut crop for all of France is usually estimated to be in the neighborhood of 800,000 sacks of 110 pounds each. In the crop year 1925-26, which is believed to have been about normal, there were exported from the so-called Perigord, or Bordeaux, area, to all countries, during the period October 1, 1925 to September 30, 1926, according to unofficial estimates prepared by a local broker, 201,905 sacks of walnuts in the shell, and 328,041 cases of "cerneaux" or wal nut meats.

According to the statistics compiled by this broker, from ship's manifests, the Bordeaux exports by countries of destination during the period above mentioned, were as follows: Unshelled walnuts, sacks; United States, 40,025; England, 35,677; Germany, Holland and Scandinavia, 86,350 and the remainder to other countries. Shelled walnuts, cases: United States, 218,114; England, 55,746; Canada, 45,370; Germany, Holland and Scandinavia, 8,821. While the foregoing statistics relate to exports from Bordeaux, they no doubt contain also considerable quantities of walnuts that were shipped into Bordeaux from Southeastern France.

Market situation

American buyers appear to be awaiting further developments before placing orders for the new Bordeaux crop. Merchants report that very little business had been transacted up to the middle of September and that prices for the New York market had not reached a definite level, either as regards walnuts in the shell, or unshelled. Some business has been done on a small scale for October shipments of new crop Extra Halves, in cases, at figures which are variously stated to be from \$39.12 to \$42.67, cost and freight, New York, per 100 pounds. Local firms on September 16 were said to be asking \$35.56 per 100 pounds, cost and freight, New York, for Extra Halves, but found practically no buyers at that rate. It is believed that American buyers are awaiting a clarification of the situation as regards crop conditions both at home and abroad before making commitments. Local prices have been showing a tendency to weaken because of the favorable weather conditions lately, but they may easily change one way or the other before the crop is actually gathered. For Marbots, in the shell, it is understood that tentative prices asked on September 16, cost and freight, New York, were Francs 700 per sack of 100 kilos, or \$12.45 per 100 pounds, which is a slight decline from a few weeks previous, but there appear to be few if any transactions at that price, American buyers apparently being unwilling to give more than \$10.67 to \$11.56 per 100 pounds.

It appears to be the general opinion that unless the weather should now become exceptionally unfavorable, there will be no difficulty about shipping table walnuts from France to America in ample time for Thanksgiving. With a continuance of favorable conditions it is believed a small part of the crop would be ready for shipment as early as October 15; but the general expectation is that most of the shipments will go by the vessels which are scheduled to sail October 22 or 27 or November 4, and probably most largely by that of November 5.

Stocks of 1926 crop of walnut meats

Some carry over stocks of walnut meats from the 1926 crop still remain in storage in Bordeaux. It has been found impracticable to determine the quantity of these stocks but they are said to be of some importance and consist of Extra Halves and Broken Pieces principally made from imported Roumanian and other foreign nuts. Difficulty has been found in selling them and it is believed that in spite of a recent reduction in price to \$35.56 per 100 pounds f o b Bordeaux, the greater part will not be disposed of at that price in view of the early arrival of the French crop.

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W-28

FOREIGN NEWS ON NUTS

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WALNUT CROP PROSPECTS IN THE DAUPHINE, FRANCE

The 1927 walnut crop in the Department of Isere, the most important producing area in the Dauphine, promises to be abundant, according to a report received in the Bureau of Agricultural Economics from Consul Hugh H. Watson at Lyon. It is generally estimated that the so-called "Grenoble nuts", which include Mayettes, Franquettes, and Parisiennes, the crop will be double that of 1926. Since the 1926 crop was 50,000 sacks of 110 pounds each, this year's crop will produce approximately 100,000 sacks of these nuts. A crop of that size would about equal that of 1925 and would be approximately 15 per cent over a normal yield for that region. Chabertes, which a year ago produced only 30 per cent of an average yield, are very abundant this year in all the regions where these nuts are produced. In some localities both Grenoble nuts and Chabertes have suffered from wind and from hail. This damage is more or less localized, however, and the loss probably does not exceed one-twentieth of the crop.

The Grenoble nuts will be larger than in 1926 and of regular dimension. The quality is still doubtful. Many wormy nuts can be seen on the trees. The weather is cold and rainy and if this persists the nuts, which require dry and warm weather, will ripen under unfavorable conditions. Many walnut trees have completely lost their foliage, which gives rise to serious concern regarding the quality of the nuts.

The nuts may ripen early this year. In fact, it has been thought that the season would be two weeks in advance of that of 1926 when the first shipments of nuts dried in the open air were made about November 10, which was a week to ten days later than normal. Much depends upon the condition in which the nuts are dried and a continuation of the present (September 15) weather may retard the nuts. If circumstances are favorable, the first shipments to the United States of nuts dried in the open should be made at the beginning of November.

Old stocks

Very few of the 1926 crop of nuts remain in the Isere. One syndicate is reported to be still holding about 400 sacks of 110 pounds each, while dealers have about 2,000 sacks. Despite the insignificant stocks, there are practically no transactions either in nuts or in halves. This is probably due to the heavy supplies of the new crop expected to be available at an early date, for which no prices are as yet quoted.

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F.S.
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October 13, 1927

FOREIGN NEWS ON NUTS

CHINESE WALNUT PROSPECTS

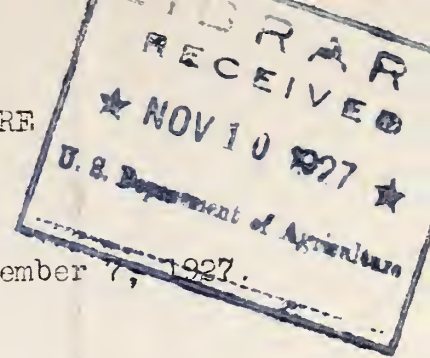
The Chinese walnut crop this year is moving from the interior to the export ports about ten days late, according to a cable received in the Bureau of Agricultural Economics from Mr. Paul O. Nyhus, the American agricultural commissioner in China. In general, local supplies of both nuts and meats are expected to be irregular this year due to the new war between the Shanghai and Peking forces.

Reports in the Tientsin Consulate General show exports of 110,000 pounds of walnuts to the United States during September. These consisted mostly of walnuts in the shell. Last year 215,100 pounds of walnuts in the shell were exported to the United States during September. October shipments to the American market this year may not exceed one-half of last year's large shipments when 4,579,100 pounds of walnuts in the shell and 179,300 pounds of walnut meats were exported to the United States.

There is no settled market in walnut meats, states Mr. Nyhus. Local asking prices for walnuts in the shell are still somewhat higher than most of the American offers. Tientsin quotations of exporters are in the neighborhood of $8\frac{1}{2}$ cents per pound c.i.f. Pacific Coast ports. A year ago "in shell" prices opened at about $8\frac{1}{4}$ cents (gold) per pound, c.i.f. the Pacific Coast with the bulk of the movement at about 9 cents.

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F.S.
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November 7, 1927.

FOREIGN NEWS ON NUTS

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MARKET PROSPECTS IN FRENCH WALNUT TRADE

The 1927 walnut harvest in France is completed and there have already been important shipments to the United States of shelled walnuts from the new crop, according to a report dated October 18 received in the Bureau of Agricultural Economics from Consul Lucien Memminger at Bordeaux. The first shipments of 1927 Marbots and Cornes in the shell from Bordeaux to New York were scheduled to be made on October 21, states the Consul, to be followed by others at short intervals, to arrive in time for Thanksgiving. As regards shelled walnuts, it has become customary for some packers to crack for earliest possible shipment in order to benefit from the high prices prevailing at the beginning of the season, but it is unusual for shipments of table nuts to be made until the last part of October.

There is nothing new to report on walnut crop prospects in France except that the crops in both the Bordeaux and the Dauphine area are said to have been unusually heavy this year. For a detailed statement on the crop situation, see Foreign Service releases, F.S./W-27 and F.S./W-28, released by the Bureau of Agricultural Economics under date of October 10, 1927.

Notwithstanding the fact that the new crop was practically ready, the price situation as regards the sale of walnuts in the shell was not yet clear at the date of writing, states Consul Memminger. In general, American offers were below the prices asked by the French merchants. Several merchants have indicated a willingness to sell Cornes in the shell at \$10.60 to \$11.50 per 100 pounds, and Marbots at \$11.50 to \$12.20 per 100 pounds, c.i.f. New York, but American importers up to that time were unwilling to pay more than \$9.75 per 100 pounds.

Prices on shelled walnuts are ruled entirely by the American market, states Consul Memminger, since there is little demand for shelled walnuts in France, Germany or England. The prices for "Extra Halves", which opened at \$42.46 per 100 pounds, c.i.f. New York, for October shipment, are now lower, some merchants having quoted \$35.40 per 100 pounds for late October shipment; \$32.35 for November shipment; \$28.30 for November-March shipment, and \$26.50 for December-March shipment.

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UNITED STATES DEPARTMENT OF AGRICULTURE
Bureau of Agricultural Economics
Washington

U. S. Department of Agriculture
November 10, 1927

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FOREIGN NEWS ON NUTS

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THE FRENCH WALNUT INDUSTRY a/

France is by far the most important source of supply for the walnuts imported into the United States. The bulk of these imports from France consists of walnut meats but imports of walnuts in the shell are also important. Such imports during the past five crop years have averaged 14,570,000 pounds of walnut meats and 6,585,000 pounds of walnuts in the shell. In other words, France supplied on an average during these years approximately 70 per cent of the shelled walnuts and 28 per cent of the walnuts in the shell imported into the United States.

Walnuts are grown all over southern France and in some of the Departments in the southern part of northern France. From a commercial point of view, however, the producing areas may be divided into two general divisions, the Bordeaux district and the Dauphine. The Bordeaux region comprises all of the important producing Departments in the southern parts of northern France and in the central and southwestern parts of southern France. The Dauphine area comprises the several important producing Departments in southeastern France. While neither the French Government nor commercial agencies maintain a regular crop reporting service for the domestic walnut crop, it seems to be the consensus of opinion that a normal crop amounts to about 800,000 bags of 110 pounds each of unshelled nuts.

Varieties of walnuts

A number of varieties, named usually according to the districts in which they are grown, are produced in the various Departments, but Marbots, Cornes, Cahors, Charentes, Mayettes and Chabertes constitute the bulk of the crop entering into the trade. As a general rule the trade usually refers to French walnuts as either Bordeaux or Grenoble nuts. Bordeaux nuts comprise all of the nuts grown in the central and western Departments although the term includes a number of different varieties, the most important of which are Marbots, Cornes, Cahors, and Charentes. Grenoble nuts include all of the walnuts produced in the southeastern Departments, known as the Dauphine. This term also covers a number of distinct varieties, the most important of which are Mayettes, Chabertes, Franquettes, and Parisiennes.

a/ This release is based on reports forwarded to the United States Department of Agriculture by Consul Lucien Memminger at Bordeaux, Consul Howard F. Withey at Limoges, and Consul Hugh H. Watson at Lyon.

Marbots are produced largely in the Departments of Lot and Correze and particularly in the hilly country east of Brievés. The production of the rougher shelled and slightly later maturing variety known as Cornes is more scattered, important quantities being produced in the small river valleys between Brievés and Périgéaux in the Department of Dordogne and in the Departments of Lot, Correze, Isère, and certain bordering districts. Practically all of the table walnuts, i.e., walnuts in the shell, exported from France, consist of these two varieties. The Department of Lot produces most of the Cahors. The Charentes are grown largely in the Departments of Charente, Gironde, Vienne and Deux-Sevres. The Mayettes and Chabertes are produced mainly in the Department of Isère in the Dauphine. The aggregate of all the different varieties goes to make up the total known as "nuts for cracking" which comprise the bulk of the French walnut trade.

Methods of cultivation

The production of walnuts is done mainly by the small farmers as an adjunct to the regular farm crops. It is impossible to make any estimate as to the land devoted to walnut culture as the trees are usually placed indiscriminately in the fields and along the roadsides. Approximately 45 to 50 feet are customarily allowed between trees. The fertilization of the ground with barnyard manure for the intercropping seems to suffice for the nourishment of the trees. During the war many trees were cut down for their wood but this loss has been replaced by young trees that are now beginning to bear and the annual production is as high as before.

Harvesting and shipping seasons

According to expressions used in the French walnut trade an "early crop" is considered to be one that is ready for harvest by September 15; the harvest of a "normal crop" takes place about September 30, while the harvest of what is known as a "late crop" begins around October 15. From 15 to 20 days are required for drying the walnuts before they can be shipped to market. The nuts are dried by spreading them on some convenient level and turning them from time to time until they are dry enough for shipment. Walnuts in the shell for table use are exported principally during the months of October to December. Shelled nuts are exported mainly during the period January to May.

Walnut shelling

While separate statistics are not available, it is known that by far the largest part of the French walnut exports consist of "cerneaux", or walnut meats. The nuts for shelling are purchased by buyers for the shelling concerns directly from the farmers. Purchases are made by sampling and the price paid depends on the number of culls found and the quality of the meats. All purchases from the farmers are paid for in cash. Shelling concerns appear to feel that there is much to be desired in the treatment accorded them in their dealings with the farmer, as they claim the latter are ignorant of conditions in the industry and careless of its future.

The larger portion of the shelled walnuts shipped from Bordeaux is cracked by hand. The cracking and sorting is done almost entirely by women and girls operating on a piece work basis. The working day is nine hours. A good worker can crack and sort about 66 pounds of nuts per day, yielding about 17 to 20 pounds of nut meats of all grades.

In Bordeaux regular shop conditions prevail, the work of each shop being done under one roof and with adequate supervision. In the country districts the producers are inclined to farm the work out to the peasants, who are charged with a certain number of pounds of nuts for cracking in their homes, afterwards bringing back the same weight of cracked nuts which are then shelled and sorted in the shop. While the cost of having the nuts cracked in the country is cheaper, it is stated that the cracking of nuts in the farm houses is not always done under strictly sanitary conditions.

Most of the French Walnuts entering into the export trade are cracked and shelled in the packing houses. The cracking of nuts is done on rough wooden tables or benches with a small wooden mallet. The worker cracks about fifty or a hundred nuts, and then removes the kernels with a small pointed knife. Sorting of the kernels is done at the same time. In front of each worker are five boxes providing for the following grades, extra halves, pieces, harlequins, and two grades of culls. The latter are pressed for oil and do not enter into the trade as nut meats. The sorting is usually gone over again by special employees to insure that it is well done. The so-called "harlequins" are nut meats which, while of full weight and size, are yellow or off-color. This fault is due to excessive dampness in the late growing season or from other unseasonable climatic conditions or faulty curing of the nuts after gathering. The harlequin kernels are edible but they bring a considerably lower price than the extra halves. They are usually graded bright yellow, darks, and pieces.

Comparatively few of the firms engaged in cracking and shelling walnuts use machinery in their operations. The expense of installing such equipment is almost prohibitive for the small concerns and labor for cracking by hand is so readily procurable and easily trained that there is little incentive to improve the industry along mechanical lines. In cases where mechanical means are used for cracking the nuts, the machines are usually of the roller type with two rollers operating in a vertical position and so spaced as to accommodate nuts of varying size. The nuts, which are fed to the machine by gravity, are supposed to enter the rollers automatically at the point where the intervening space is sufficiently large to break the shell properly with a minimum amount of damage to the kernel. These machines do not appear, however, to be particularly efficient as many of the nuts that pass through them are not sufficiently broken, thus necessitating sorting and re-cracking by hand, and moreover the proportion of broken kernels is unduly large.

Some of the shops have endeavored to secure a more complete specialization of labor by the installation of a traveling belt which carries the cracked nuts between two rows of workers who shell and sort the nuts as they are carried past. This scheme is not extensively used. Most of the larger

firms employ a series of screens for sifting the kernels, separating the large from the small, and removing the broken pieces which are sold at a considerably lower price as "broken halves."

Drying methods and packing

Immediately after cracking the meats are dried or baked in a sort of oven or kiln. This process is an important one as it removes any excess moisture in the nuts and increases the keeping qualities. For this process the kernels are spread out on shallow trays with bottoms of wire mesh to insure a free circulation of air. The trays are then placed in the kiln which has been heated to a temperature of about 130 degrees Fahrenheit and baked thus for about eight hours. In the early part of the season when the nuts are damp, the loss in weight in this drying process is apt to be considerable, amounting at times to as much as twenty per cent. But in the early part of the summer, after the nuts have been in dry storage for several months, the loss in weight is negligible. The heat applied is not sufficient, however, to kill the larva of the weevil which is usually present and ready under proper conditions to develop and attack the walnut meat. It is stated that at least 176 degrees are necessary to kill the larva and that such heat is injurious to the nuts.

Shelled walnuts for the American market are invariably packed and shipped in wooden cases containing 25 kilos or 55.12 pounds of meat. The cases are marked "55 Pounds Net" and are sold by the trade in the United States on this basis. For the trade in England, Holland and the Scandinavian countries, a half size case containing 12-1/2 kilos or 27.6 pounds is used to a considerable extent. This package, however, has never been popular with American importers.

Standards for shelled nuts

The French walnut meats are graded according to locality of production, size and color. The best grade of meats from the Bordeaux area is sold as "Bordeaux Halves" while the best grades from the Dauphine are sold as "Chabertes" and "Mayette Halves." Lower grades from both areas are sold as "Harlequins" and "Invalides". Consul Memminger at Bordeaux states that a study of the standardization and grading of shelled walnuts in France, together with an examination in different factories of the varying qualities of nuts available for shipment, clearly indicate that the present standards are totally inadequate to provide for the different qualities which may be supplied under each heading. A casual examination of the nuts ready for shipment in a number of shelling establishments discloses a considerable range in quality of nuts all graded as "Extra halves". Seasonal growing conditions, care in cracking and sorting, care in buying nuts for cracking, the integrity of the firm doing the shelling, the prices at which business is taken, all affect the quality of the resulting product.

Exports

French export statistics make no distinction between shelled and unshelled walnuts and for that reason it is impossible to determine the exact proportion of each entering into the export trade. It is the general opinion, however, that approximately three-fourths of the French walnut crop is exported. France itself consumes only a very small quantity of shelled walnuts and a relatively small quantity of walnuts in the shell. The bulk of the shelled and unshelled crop is exported through Bordeaux, but some of the walnuts grown in the Dauphine are shipped to Marseilles and exported from that port.

As previously stated, exports of walnuts in the shell are important during the first three months of the season, but after that period most of the exports consist of walnut meats. Exports of "table walnuts" are important early in the season because of the demand in the United States, England, and Germany for the Thanksgiving and Christmas trade. The stocks remaining after the demand for table walnuts has been satisfied are cracked and exported as "cerneaux", mainly to the United States. All excess and defective stock is used in the manufacture of walnut oil and soap. The farmers in the walnut producing regions rarely use olive or peanut oil. They periodically take enough walnuts to the nearest oil mill to keep themselves provided with walnut oil.

Marbots and Cornes constitute the bulk of the exports of table varieties although some Charentes and Mayettes are also exported in the shell. Practically all of the different varieties are used in the "cerneaux" trade.

United States imports of French walnuts

The following table gives the United States imports of walnuts in the shell and walnut meats from France by months during the past five years. Imports of French walnut meats during that period averaged 14,570,000 pounds annually, while the imports of walnuts in the shell averaged 6,595,000 pounds annually. Imports from all other sources during the same period averaged 6,369,000 pounds of walnut meats and 16,633,000 pounds of walnuts in the shell annually. Thus it is seen that France supplies on an average approximately 70 per cent of the United States imports of walnut meats and around 28 per cent of the imports of table nuts. The statistics show that most of the walnut meats imported from France come in during the months January to June, while most of the walnuts in the shell are imported during the months October to January. Assuming that it takes around three pounds of walnuts in the shell to yield one pound of walnut meats, the total imports of French walnuts on an "in shell" basis averages around 50,304,000 pounds annually, as compared with 35,741,000 pounds from all other countries.

FRENCH WALNUTS (SHELLED): Imports into the United States, 1922-23
to 1926-27

Month	1922	1923	1924	1925	1926
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
October	758,497	1,020,141	579,573	827,748	888,219
November	727,076	1,018,079	795,162	940,196	459,944
December	1,153,238	1,178,241	1,417,730	1,607,865	757,972
January	1,570,571	1,287,767	2,442,721	2,415,000	1,179,603
February	1,904,294	2,743,309	3,768,166	2,660,458	1,192,483
March	2,752,035	2,274,892	2,534,371	3,163,118	1,141,094
April	2,253,534	2,816,781	2,152,180	1,870,538	910,956
May	1,779,400	1,609,526	1,279,719	1,844,660	667,329
June	559,643	596,649	1,201,790	1,463,578	758,688
July	266,284	165,915	191,725	660,604	376,992
August	56,925	42,625	20,625	193,573	100,508
September ...	365,234	670,858	468,759	178,991	153,957
Total	14,146,731	15,425,783	16,852,621	17,826,329	8,587,745

FRENCH WALNUTS (UNSHELLED): Imports into the United States, 1922-23
to 1926-27

Month	1922	1923	1924	1925	1926
	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>	<u>Pounds</u>
October	173,998	585,643	99,942	27,766	369,875
November	4,463,210	2,201,628	5,071,210	4,612,240	373,658
December	2,025,667	182,671	1,218,538	1,316,822	517,030
January	240,983	0	1,115,930	493,183	143,242
February	169,279	251,310	234,684	5,184	194,261
March	11,287	368,792	518,727	0	315,913
April	176,378	454,004	241,234	0	49,485
May	428,965	452,259	446,534	5,665	54,669
June	547,680	110,230	12,650	288,328	245,974
July	20	44,000	0	1,117,743	268,746
August	0	0	49,048	15,432	198,060
September ...	16,200	168,942	0	168,932	58,860
Total	8,253,687	4,819,479	9,058,497	8,051,295	2,789,773

Compiled from official records of the Department of Commerce.



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U. S. Department of Agriculture

December 15, 1927

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FOREIGN NEWS ON NUTS

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THE UNITED STATES IMPORT TRADE IN "ENGLISH" WALNUTS

The imports of "English" or "Persian" walnuts into the United States in recent years have provided approximately 63 per cent of the average available supply in this country as against 72 per cent before the war. Total imports a/ into the United States during the past five years averaged 86,000,000 pounds annually as against 53,000,000 pounds before the war. The principal sources of supply were France, China, Italy, Rumania, and Spain. The domestic crop during the same period averaged 50,000,000 pounds as against 21,000,000 pounds before the war. Imports of walnuts in the shell have been maintained at a fairly stable level. In the past five crop years they averaged 23,000,000 pounds annually as against an average of 22,000,000 during the three crop years 1912-14. Imports of walnut meats on the other hand show an increase of more than 100 per cent, having averaged about 21,000,000 pounds during the past five years as against only 10,000,000 pounds before the war.

Combining imports and the domestic crop it is found that the total available walnut supply in the United States during the past five crop years has averaged 136,000,000 pounds on an "in shell" basis as against 74,000,000 pounds before the war.

Only a small proportion of the domestic crop, estimated at about 15 per cent of the total, is cracked and sold as meats. From 85 to 90 per cent of the California crop consists of high-grade nuts which find a market in the "table nut" trade. The remaining 10 or 15 per cent, consisting largely of No. 2's and culls, is sold as walnut meats. Walnut meats are of much more importance in the United States import trade than walnuts in the shell. In fact, if imports of walnut meats for the past five crop years are converted back to an "in shell" basis it will be found that they constitute approximately 73 per cent of the total imports.

With the United States "English" walnut crop averaging around 50,000,000 pounds, about 85 to 90 per cent of which is used for the "table nut" trade, and with imports of walnuts "in shell" averaging 23,000,000 annually, it can be seen that the domestic industry provides for approximately 60 per cent of the available supply of "table walnuts" and foreign countries about 40 per cent. The situation in regard to walnut meats is quite different.

a/ On an "in shell" basis. In converting shelled walnuts to an unshelled basis it is assumed that three pounds of foreign unshelled nuts will yield one pound of walnut meats.

For detailed statements on the walnut industry in Italy, Rumania, China, and France, see Foreign Service reports, W-21, W-22, W-26, and W-31, released by the Bureau of Agricultural Economics.

Since only from 10 to 15 per cent of the domestic crop is used in the kernel trade and since imports of meats average around 21,000,000 pounds annually, or the equivalent of 63,000,000 pounds in the shell, it can be seen that the domestic industry would have to expand considerably before being able to supply the demand in that branch of the trade.

Foreign competition

Most of the imports of walnuts in the shell are sold as a table delicacy but the bulk of the imported kernels is purchased by the bakery and confectionary trades. In general the foreign nuts are of inferior quality compared with the domestic grown product. The inferiority of the foreign walnuts in the shell is due partly to quality and partly to the fact that most of them are ungraded. Small, decayed, partially filled and empty nuts in most cases are not separated and graded as they are in California. Much of this inferiority disappears in the case of the foreign walnut kernels but in general they lack flavor compared with the domestic product. California walnuts, both shelled and unshelled, usually sell at a considerable premium over the imported product.

As previously stated, the proportion of the domestic "English" walnut crop used for the kernel trade is relatively small, only the unsealed, small and inferior grades of nuts being used for that purpose. With the increasing domestic production, however, a larger quantity of small and inferior nuts will be available for the domestic kernel trade. Shelling is a hand process in all of the important foreign producing countries. While a shelling machine is used in California, a considerable labor expenditure is required for sorting and packing. Because of the higher costs of labor in California there is some doubt as to whether even the substantial price premium received for the domestic product would enable growers to compete on a large scale with the relatively cheap Chinese and Mediterranean kernels.

France is by far the most important source of supply for the walnuts imported into the United States. Total imports of walnuts from France on an "in shell basis" during the past five years averaged 50,305,000 pounds per annum. The bulk of these imports from France consists of walnut meats but imports of walnuts in the shell are also important. Imports from France during the past five crop years have averaged 14,570,000 pounds of walnut meats and 6,595,000 pounds of walnuts in the shell. In other words, France supplied on an average during these years approximately 70 per cent of the walnut kernels and 28 per cent of the walnuts in the shell imported into the United States.

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China is the next most important source of supply, imports of "in shell" nuts having averaged 3,660,000 pounds annually and kernels 3,585,000 pounds annually during the past five crop years. On an "in shell" basis this represents an annual average importation of 14,412,000 pounds of walnuts. Italy follows China in the order of importance with an annual average of 10,297,000 pounds of walnuts in the shell and 382,000 pounds of walnut kernels, representing an "in shell" equivalent of 11,443,000 pounds. Spain and Rumania are also important shippers of walnuts to the American market.

Tariff

Under the Tariff act of 1913 the duty on walnuts imported into the United States was 2 cents per pound on nuts in the shell and 4 cents per pound on kernels. The duty was raised in 1922 to 4 cents for nuts in the shell and 12 cents for kernels. Imports for consumption of walnuts in the shell during the calendar year 1926 amounted to 28,069,000 pounds valued at \$3,508,772 upon which the revenue collected at 4 cents per pound totaled \$1,123,000. This is equivalent to an ad valorem duty of 32 per cent. Imports for consumption of walnut kernels the same year amounted to 21,154,000 pounds valued at \$5,423,000 upon which the total revenue collected amounted to \$2,539,000 or the equivalent of 47 per cent ad valorem. In 1914-15 the ad valorem equivalent worked out at 27 per cent for walnuts in the shell and 20 per cent for walnut kernels.

The domestic walnut industry

California produces practically the entire commercial walnut crop of the United States and the industry is expanding steadily. Approximately 90 per cent of the California crop is grown in the counties of Los Angeles, Orange, Ventura, and Santa Barbara in southern California. Although production has had to compete for the land with such crops as citrus fruits, grapes, lima beans, and vegetables, the actual bearing acreage has increased from 34,138 acres in 1914 to 74,723 acres in 1927. The California Department of Agriculture estimates that on the basis of the number of planted acres that have not yet come into bearing, the actual bearing acreage in 1930 will amount to 90,300 acres. A walnut tree begins to bear when between 5 and 7 years of age. Whether the domestic industry will be able to expand to such an extent as to supply the entire demand for walnuts in the American market will depend largely on the relative costs of foreign and domestic walnuts in the domestic market, and on the competition of other forms of agriculture in the walnut growing regions.

WALNUTS: United States production, imports and consumption

Seasons	Domestic	In the	Imports	Total in	Available	Per cent
October 1 to	crop a/	shell	Meats	shell	for	supplied
September 30				basis c/	consumption	by domes-
	1,000	1,000	1,000	1,000	1,000	tic crop
	pounds	pounds	pounds	pounds	pounds	per cent
Average						
1912-13 to						
1914-15	21,000	22,260	10,307	53,181	74,181	28
1922-23	54,000	19,090	18,650	75,040	129,040	45
1923-24	50,000	19,325	19,197	76,916	126,916	39
1924-25	45,000	30,487	23,365	100,582	145,582	31
1925-26	72,000	22,785	23,135	92,190	164,190	44
1926-27	30,000	24,455	20,347	85,496	115,496	26
Average						
1922-26	50,200	23,228	20,939	86,045	136,245	37

a/ Crop Report, State of California Department of Agriculture. b/ United States Department of Commerce. c/ On the assumption that one pound of shelled nuts is the product of three pounds of unshelled nuts.

WALNUTS: Summary table of United States imports, 1922-23 to 1926-27

Season	France	Italy	Spain	Rumania	China	Total
Oct - Sept						all
						countries
In the shell	1,000	1,000	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds	pounds	pounds
1922-23	8,253	8,478	47	108	1,591	19,090
1923-24	4,820	10,393	54	125	2,042	19,325
1924-25	9,060	11,567	26	772	6,374	30,487
1925-26	8,051	9,395	104	1,054	2,449	22,785
1926-27	2,789	11,652	a/	2,049	5,846	24,455
Shelled						
1922-23	14,146	310	585	294	1,520	18,650
1923-24	15,426	132	1,080	71	1,770	19,197
1924-25	16,854	750	1,034	203	3,631	23,365
1925-26	17,834	391	759	507	2,973	23,135
1926-27	8,588	328	595	699	8,029	20,347

Source: Official records of the Department of Commerce.

a/ Less than 500 pounds.

WALNUTS (UNSHELLED): Imports into the United States, 1924-25 to 1926-27

Season and month	France	Italy	Spain	Rumania	China	Total all countries
	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>	<u>1,000</u> <u>pounds</u>
1924-25:						
October ..	100	3,216	11	---	83	3,415
November ..	5,071	3,864	a/	176	2,475	12,133
December ..	1,219	3,060	9	66	1,007	5,413
January ..	1,116	532	---	---	553	2,214
February ..	285	30	6	44	318	683
March	519	412	---	---	1,259	2,869
April	241	287	---	---	506	1,263
May	447	34	---	---	173	1,351
June	13	32	---	163	a/	423
July	--	6	---	211	a/	256
August ...	49	32	---	80	---	307
September :	--	62	---	32	---	160
Total ..	9,060	11,567	26	772	6,374	30,487
1925-26:						
October ..	28	2,448	33	---	100	2,741
November ..	4,612	5,229	62	120	1,993	12,909
December ..	1,317	820	3	373	57	2,829
January ..	493	266	6	284	34	1,168
February ..	5	10	---	22	9	139
March	---	68	---	146	---	234
April	---	105	---	87	---	191
May	6	19	---	22	203	250
June	288	---	---	---	---	288
July	1,118	43	---	---	28	1,421
August ...	15	117	---	---	---	150
September :	169	270	---	---	25	465
Total ..	8,051	9,395	104	1,054	2,449	22,785
1926-27:						
October ..	370	2,510	---	---	525	3,455
November ..	374	8,343	---	793	4,142	14,690
December ..	517	770	---	1,234	449	3,199
January ..	143	23	---	---	132	309
February ..	194	a/	a/	---	190	388
March	316	a/	---	22	192	592
April	49	5	---	---	15	92
May	55	a/	---	---	200	312
June	246	---	---	---	1	634
July	268	---	---	---	a/	279
August ...	198	1	---	---	---	377
September :	59	---	---	---	---	128
Total ..	2,789	11,652	a/	2,049	5,846	24,455

Source: United States Department of Commerce.

a/ Less than 500 pounds.

WALNUTS (SHELLED): Imports into the United States, 1924-25 to 1926-27

Season and month	France	Italy	Spain	Rumania	China	Total all countries
1924-25:	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
October ...	580	260	51	0	2	896
November ..	795	75	0	0	18	907
December...	1,418	19	61	0	151	1,682
January ...	2,443	40	122	26	418	3,151
February ..	3,768	27	347	48	390	4,749
March	2,534	57	129	58	866	3,811
April	2,152	82	97	39	760	3,324
May	1,280	87	152	14	470	2,134
June	1,202	102	73	6	304	1,733
July	192	1	2	8	115	333
August ...	21	0	0	4	126	151
September :	469	0	0	0	11	494
Total ...	16,854	750	1,034	203	3,631	23,365
1925-26:						
October ...	828	25	6	0	0	899
November ..	940	30	71	0	0	1,077
December ..	1,608	16	44	7	104	1,899
January ...	2,415	39	113	28	420	3,023
February ..	2,660	25	81	3	497	3,402
March	3,163	19	76	72	468	3,880
April	1,871	86	54	153	836	3,045
May	1,845	16	192	171	307	2,633
June	1,464	46	113	62	135	1,842
July	667	47	6	11	42	786
August ...	194	35	3	0	67	333
September :	179	7	0	0	97	316
Total ...	17,834	391	759	507	2,973	23,135
1926-27:						
October ...	888	69	14	53	0	1,081
November ..	460	62	11	6	140	694
December ..	758	37	61	73	430	1,539
January ...	1,180	44	175	152	1,274	3,015
February ..	1,192	56	83	56	1,641	3,580
March	1,141	19	40	151	1,989	3,812
April	911	9	59	194	1,066	2,624
May	667	10	133	14	838	1,845
June	759	10	3	0	560	1,355
July	377	0	16	0	91	526
August ...	101	0	0	0	0	116
September :	154	12	0	0	0	162
Total ...	8,588	328	595	699	8,029	20,347

Source: United States Department of Commerce.

a/ Less than 500 pounds.

